

The Forrester Wave™: Omnichannel Order Management Systems, Q3 2018

The 10 Providers That Matter Most And How They Stack Up

by Brendan Witcher
September 24, 2018

Why Read This Report

In our 40-criteria evaluation of omnichannel order management system (OMS) providers, we identified the 10 most significant ones — Aptos, Digital River, IBM, Jagged Peak, Kibo, Magento, Manhattan Associates, Oracle, Oracle NetSuite, and Radial — and researched, analyzed, and scored them. This report shows how each provider measures up and helps digital strategy professionals make the right choice.

Key Takeaways

Manhattan Associates And IBM Lead The Pack

Forrester's research uncovered a market in which Manhattan Associates and IBM are Leaders; Oracle NetSuite, Oracle, Aptos, and Magento are Strong Performers; Digital River, Radial, and Jagged Peak are Contenders; and Kibo is a Challenger.

Digital Strategy Pros Are Looking For Order Control And Business Optimization

Digital strategy professionals see omnichannel capabilities as a way to address their top challenges. They increasingly trust OMS providers to act as strategic partners, advising them on top omnichannel decisions.

Order Orchestration, Store Fulfillment, And Advanced Analytics Are Key Differentiators

As omnichannel customer journeys become more complex, improved order orchestration, store fulfillment, and advanced analytics will dictate which providers will lead the pack. Vendors that can provide operational efficiencies, business workflow automation, and omnichannel insights position themselves to successfully deliver value, flexibility, and confidence to their customers.

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September 24, 2018

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The OMS Is The Unsung Hero Of Digital Commerce

Today's customers are already engaging in omnichannel commerce and increasingly expect higher quality experiences across digital and in-store touchpoints: 62% of US online adults surveyed have used omnichannel services like "buy online, pick up in store" (BOPIS).¹ Putting even more pressure on retailers, 67% of US online adults who use BOPIS expect companies to notify them within 2 hours that their items are ready for pickup.²

A growing demand for omnichannel fulfillment and experiences is forcing retailers to respond or risk falling behind in delivering on their customers' expectations. Omnichannel commerce remains a top investment priority for digital commerce leaders.³ And a well-oiled OMS lies at the heart of these initiatives. Forrester defines omnichannel commerce as:

The coordination of traditional channels (marketing, selling, and fulfillment) and supporting systems to create a seamless and consistent customer experience.

Today's Omnichannel OMS Executes Four Core Capabilities

The modern OMS is the central repository for inventory and orders across channels. It orchestrates all orders across the enterprise while feeding critical order information into eCommerce and POS systems. However, these systems can't always share information seamlessly, which forces retailers to invest in custom integrations and workarounds. These customizations often overcomplicate what many retailers consider basic order management functionality. Today, digital business professionals need an OMS to deliver on four core capabilities:

- › **Enterprise-level inventory visibility.** An OMS connects data from disparate warehouse management system (WMS), POS, and enterprise resource planning (ERP) systems into a single enterprise view across selling channels. Inventory visibility enables merchants to determine whether they should make a product available for sale — and if so, when and how it can be fulfilled. Retailers depend on these capabilities to consolidate inventory data and ensure that systems see accurate stock inventory levels, often in real time.
- › **Distributed order management (DOM).** DOM facilitates configurable order processing and intelligent order-routing algorithms to deliver efficiencies (minimize shipping costs and time-to-delivery) in complex order orchestration. DOM also supports processes that handle numerous edge-case order scenarios including recurring orders, preorders and back orders, partial shipments, drop shipments, digital or service items, and order splitting. A DOM must have intuitive business user tools that support drag-and-drop workflow modeling, scenario testing, and optimization — all without requiring additional software development.

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- › **Customer service.** Contact center tools must capture orders taken by phone and help manage order modifications like adding or removing products, adjusting prices, accepting additional payments, or processing refunds. Since the OMS has visibility into the entire life cycle of an order, it often must determine if, when, and how an order can be modified. Leading contact center tools have an excellent user interface paired with strong functionality.
- › **Store fulfillment.** Optimizing omnichannel processes and technology in store is increasingly critical. Capabilities that contact centers and warehouses once performed, such as online order modifications and shipment packing instructions respectively, must now be in the hands of store associates. The role of the OMS in stores is to streamline pick, pack, and ship task management, and give managers control and insights around orders fulfilled in their stores. Most existing warehouse management solutions or POS are not optimized for out-of-the-box in-store deployment, so many retailers turn to the OMS to fulfill this role.

Omnichannel Order Management Systems Evaluation Overview

To assess the state of the OMS market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top OMS vendors. After examining past research, user need assessments, and vendor and expert interviews, we developed 40 evaluation criteria, which we grouped into three high-level buckets:

- › **Current offering.** Each vendor's position on the vertical axis of the Forrester Wave™ graphic indicates the strength of its current offering. Key criteria for these solutions include: solution architecture, inbound order channels, enterprise inventory management, customer service, DOM, store fulfillment, reporting and analytics, and professional services.
- › **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated planned enhancements, strategic vision for omnichannel, OMS road map innovation, industry partnerships, and the ability of the company to operate as a strategic partner to clients, not just a software provider.
- › **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's installed base, new customers, revenue, revenue growth, and financial resources to support a stated order-management-focused product and market strategy.

Evaluated Vendors And Inclusion Criteria

Forrester included 10 vendors in the assessment: Aptos, Digital River, IBM, Jagged Peak, Kibo, Magento, Manhattan Associates, Oracle, Oracle NetSuite, and Radial (see Figure 1). Each of these vendors has:

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- › **A product that supports complex omnichannel order orchestration scenarios.** These vendors have time-tested, mature, and packaged capabilities that support complex and configurable end-to-end order life-cycle management across channels and between fulfillment hubs. Capabilities include but are not limited to inventory management, order capture, order modification, and order orchestration workflow.
- › **A focus on retail and wholesale verticals.** Beyond the ability to support order orchestration in a single channel, these vendors richly support both retail and wholesale omnichannel retailers. These vendors have capabilities to manage the life cycle of an order across online and offline (brick-and-mortar) locations.
- › **A track record of supporting omnichannel order management in large enterprises.** Vendors in this category have proved that they are deployed at numerous enterprise-class organizations, have the scale to serve large customer accounts, support complex order orchestration and fulfillment channels across channels, and possess a deep understanding of the order management needs of their clients.
- › **Mindshare among the Forrester client base.** We evaluated vendors that Forrester clients have frequently and consistently mentioned during inquiries, shortlists, consulting projects, and case studies over the past year.
- › **A minimum of \$15 million in annual OMS revenue.** To be included in this Forrester Wave, vendors had to have a proven product and state that they generate \$15 million or more in annual revenue that they could reasonably attribute to their OMS offering specifically.

Forrester did not include companies in this assessment with a primary focus on other related market segments, such as:

- › **ERP solutions.** Today, ERP platforms are ill-equipped to manage omnichannel orders that must transcend online and offline channels. ERP solutions commonly offer sophisticated order management modules, with strong support for orchestrating orders from capture through fulfillment. However, these solutions are typically used by manufacturing firms that must manage bills of materials (BOMs), suppliers, manufacturing facility constraints, logistics, and supply chain issues.
- › **Standalone eCommerce and POS platforms.** Most eCommerce and POS solutions in the market have basic order management capabilities that support simple fulfillment scenarios within a single channel. While these solutions may be adequate for clients with a single pool of inventory serving only a single channel, they are ill-equipped to manage complex fulfillment scenarios involving pooled inventory locations, complex order fulfillment life cycles, drop shipping, and the operational complexities of store-based order fulfillment.
- › **Bundled or midmarket-focused solutions.** Forrester also identified several vendors that are successfully serving this space, including enVista, Freestyle Solutions, NewStore, OrderDynamics, Salesforce, SAP Hybris, and Softeon. However, these vendors have primarily served small to midmarket companies (or divisions within larger companies), have smaller installed bases, have less mature offerings, or do not typically sell OMS as a standalone solution.⁴

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FIGURE 1 Evaluated Vendors And Product Information

Vendor	Product	Version Number
Aptos	Aptos Enterprise Order Management	2018.1
Digital River	Digital River Global Commerce, Digital River Global Fulfillment	N/A
IBM	IBM Order Management	Version 18.1 (SaaS), Version 9.5 (On Premise)
Jagged Peak	Jagged Peak EDGE	N/A
Kibo	Kibo Distributed Order Management	N/A
Magento	Magento Order Management	N/A
Manhattan Associates	Manhattan Active Omni Order Management Systems (OMS)	N/A
Oracle	Oracle Retail Order Management System Cloud Service & Oracle Retail Order Broker Cloud Service	OROMS V17 & OROB V16
Oracle NetSuite	NetSuite OneWorld with NetSuite Advanced Order Management Cloud Services	2018.1 Release
Radial	Radial Order Management	18.1

Vendor Profiles

This evaluation of the omnichannel OMS market is intended to be a starting point only. We encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool (see Figure 2 and see Figure 3). Click the link at the beginning of this report on Forrester.com to download the tool.

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FIGURE 2 Forrester Wave™: Omnichannel Order Management Systems, Q3 2018

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FIGURE 3 Forrester Wave™: Omnichannel Order Management Systems Scorecard, Q3 2018

	Forrester's weighting	Aptos	Digital River	IBM	Jagged Peak	Kibo	Magento	Manhattan Associates	Oracle	Oracle NetSuite	Radial
Current offering	50%	2.71	1.91	4.30	2.14	2.07	2.43	4.26	2.87	2.75	3.39
Solution architecture	10%	2.00	1.90	4.50	1.00	1.50	3.00	4.10	3.10	2.40	3.00
Order channel capabilities	5%	5.00	1.00	5.00	1.00	3.00	3.00	5.00	3.00	3.00	1.00
Enterprise inventory management	15%	2.80	1.80	5.00	3.00	1.20	1.00	4.60	2.80	3.60	3.80
Contact center capabilities	15%	3.00	1.00	5.00	2.20	3.00	3.00	5.00	3.80	3.00	5.00
Distributed order management	15%	3.00	2.80	4.20	2.30	2.50	2.50	3.70	2.70	3.70	2.50
Order orchestration	15%	2.60	2.40	4.20	2.20	2.30	2.30	4.20	2.90	1.70	3.30
Store fulfillment	15%	2.30	1.10	3.60	1.90	2.10	2.40	4.50	2.20	2.70	3.30
Reporting and analytics	5%	1.00	3.00	3.00	3.00	1.00	3.00	3.00	3.00	1.00	5.00
Professional services	5%	3.00	3.00	3.00	2.00	1.00	3.00	3.00	2.00	2.00	2.00
Strategy	50%	3.00	3.50	3.20	2.20	1.10	3.00	3.70	3.20	3.40	1.40
Product vision	30%	3.00	5.00	3.00	3.00	1.00	3.00	5.00	3.00	3.00	1.00
Partner ecosystem	20%	3.00	1.00	5.00	1.00	1.00	3.00	1.00	5.00	5.00	3.00
Innovation road map	30%	3.00	3.00	3.00	1.00	1.00	3.00	5.00	3.00	3.00	1.00
Supporting products	5%	3.00	3.00	5.00	1.00	3.00	3.00	1.00	5.00	3.00	1.00
Training/consulting	15%	3.00	5.00	1.00	5.00	1.00	3.00	3.00	1.00	3.00	1.00
Market presence	0%	1.00	5.00	4.00	1.50	2.00	1.00	3.50	2.50	2.00	2.50
Number of live installations	25%	1.00	5.00	5.00	3.00	5.00	1.00	3.00	3.00	1.00	1.00
Revenue	25%	1.00	5.00	5.00	1.00	1.00	1.00	5.00	1.00	1.00	3.00
New customers and retention	50%	1.00	5.00	3.00	1.00	1.00	1.00	3.00	3.00	3.00	3.00

All scores are based on a scale of 0 (weak) to 5 (strong).

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Leaders

- › **Manhattan Associates leads with a solution built for business users.** As it shifts from an on-premise to its cloud-based offering, Manhattan continues to develop its solutions around the omnichannel business user responsibilities to support omnichannel scenarios. It has one of the strongest offerings in the areas of store fulfillment capabilities, including endless aisle, BOPIS, and ship-from-store. Order orchestration is another area that Manhattan does well, with product-, cost-, and store-based rules that provide a great deal of control for omnichannel management. The solution is built for organizations that are willing to apply Manhattan's UI and backend logic as is. As such, it is not the strongest option for companies requiring complex, bespoke customization within the application itself or for those organizations wanting some deep capabilities in the areas of workflows and notifications.

Manhattan has strategically designed a solution for unique and practical needs of administrators, store associates, and contact center personnel. Customer reference calls revealed high satisfaction with both the current offering and future direction of the solution, and with the fact that the product offers flexibility without much complexity. However, Manhattan does not offer a full suite of solutions to support a full eCommerce/omnichannel transformation, with most of the other offerings relating solely to supply chain. In addition, their implementation partner network, while growing and a focus for Manhattan's road map, still lags those OMS vendors that primarily focus on enterprise organizations.

Manhattan Associates is a good fit for companies looking for an enterprise-class, cloud-based solution, with robust features and functionality that work well for complex-but-common omnichannel scenarios.

- › **IBM leads with a robust feature and function set built for the enterprise market.** IBM provides the most flexibility for administrators that need to manage complex order management scenarios. It has a solid solution for the foundational elements of enterprise inventory management and also enables important elements like operational management of contact centers and order channel capabilities. Organizations looking for post-purchase management will find functionality for exchanges and return processes appealing. The solution has a rules engine that firms can customize and design to address nearly all common omnichannel scenarios. But unlike others in this evaluation, the solution's UI does not come out of the box with as many of the simple task components that are common for business users, and the solution will require more specialists to operate.

IBM's OMS strategy is closely tied to its general software strategy, with a number of complementary software offerings that are critical for businesses to understand and gain insights from omnichannel operations. Customer references stated consistently that they were satisfied with both the current offering and the vision IBM had for OMS, which some customers were able to articulate. While these references also felt that IBM's partner ecosystem was very strong, there were strong feelings that IBM itself was not taking an active role in helping clients apply the solution to operations. References also stated that they needed IBM for professional services or the service integrator network for help in understanding how to apply the OMS's capabilities to achieve omnichannel best practices and optimization.

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IBM is a good fit for enterprises that have challenging omnichannel scenarios, require deep control of pre- and post-purchase order management, and are willing dedicate resources to fully maximize the capabilities of the solution.

Strong Performers

- › **Oracle NetSuite offers flexibility for midsized scenarios but not complex ones.** Oracle NetSuite offers strong state and event management functionality with scenarios that teams can customize directly in the UI and leading capabilities for inventory segmentation. Business users can easily build system triggers and create unique fulfillment rules that give some enterprise-level control over a number of distributed order management scenarios. Order orchestration rules are not as precise as other offerings and would not work well for organizations that require complex rules-based orchestration for omnichannel program support. Oracle NetSuite also offers some standard reporting with the OMS, but more advanced reporting is only available through the purchase of a separate analytics solution.

Since Oracle bought NetSuite, it has generally and strategically left NetSuite alone to continue serving its target market. NetSuite continues to grow and support a strong partner network. Customer references indicated that the offering meets their needs and that it's been updated to keep up with the biggest challenges in delivering omnichannel services at the midmarket level. Oracle NetSuite's fee-based SuiteSuccess offering is specifically designed to help clients get up and running on the software and provides guidance on best practices for becoming an omnichannel organization.

Oracle NetSuite is a good fit for midsized organizations that are looking to actively manage their omnichannel programs with limited resources and that have common, uncomplicated order orchestration needs.

- › **Oracle offers a balanced solution but lacks some advanced capabilities.** Oracle provides the tools in nearly all categories to deliver on elements that are table stakes for good omnichannel programs. Their offering supports organizations that need a comprehensive solution, while also serving international ordering and management of order exceptions and fraud. But Oracle's offering does not set high bars for most criteria. Advanced capabilities like customer-based rules and nuanced areas of order management such as substitutions and special orders lag those of other vendors in this evaluation. Store fulfillment and omnichannel program support is generally good, with improvements needed in the more focused areas of task management including order picking and packing.

Oracle's strategy for OMS is to show the value of a complete suite of solutions. It has a number of supporting products, a solid partner network, and it keeps up with industry standards across its offerings. Customer references were overall pleased with current capabilities, but none felt Oracle's offering was leading with innovation. Like other large solution providers, Oracle leans heavily on its partners for training and guidance on the OMS solution and its application in omnichannel business scenarios. Customer references want Oracle to take a more active role in training and assuring success using the OMS.

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Oracle's OMS is a good fit for enterprise and upper-midmarket companies that want to check a lot of standard feature and functionality boxes in support of omnichannel capabilities but are not looking to use an OMS for more specialized areas of omnichannel management.

- › **Aptos offers a user-friendly solution, but gaps exist for complex enterprise use.** Aptos is laser focused on retail, and while it mostly serves US-based, midmarket retailers, it has had some recent success growing internationally and upmarket into the enterprise space. Aptos offers a clean UI that is intuitive and easy to use. From a functionality perspective, order channel capabilities, distributed order management, and customer-based rules are its strengths. It lags other OMS vendors we evaluated in some of the functionality associated with substitutions, cost-based orchestration rules, ship-from-store functionality, and advanced reporting and analytics.

Aptos has taken cues from the market well and put significant resources toward developing its OMS solutions over the past two years. Customer references felt good about the solution's capabilities and where the company is headed. Notably, none of them could fully describe the company's long-term road map but pointed out that Aptos itself admits it still has feature and functionality work to do. Aptos also provides some training and support for clients directly, with the vast majority of implementations being done in tandem between a systems integrator (SI) and Aptos itself.

Aptos best meets the needs of those retailers that are ready to make the move to omnichannel and want a natively connected suite of commerce solutions with an OMS but that don't need deep features and functionality that the more mature omnichannel programs require.

- › **Magento has moved quickly to market, but deep functionality is a work in progress.** While Magento is not new as an eCommerce software offering, their OMS solution is a comparably new offering, having launched for general availability in early 2016. In a short time frame, it has built a well-rounded solution that has functionality on par with much older solutions. It offers decent contact center capabilities as well as store fulfillment support and some advanced reporting and analytics. The solution also has a modern UI that is clean and intuitive. Magento lags other vendors in enterprise inventory management, distributed order management, and order orchestration.

Magento has a respectable product vision, road map, some supporting eCommerce products, and a healthy implementation partner network. Customer references stated Magento has turned to them to learn what functionality matters, but direct, 1-on-1, ongoing OMS strategic support with its customer base is not common. While Magento offers online training, it is limited both in scope and in details around omnichannel strategy. While Magento generally has all the right pieces in place for a solid offering, its acquisition by Adobe presents a question mark over how the parent company will prioritize each part of the commerce offering as the new relationship moves from vision to execution.

Magento's primary focus is midmarket retailers. It is a good fit for organizations that are looking for an easy use solution and can live without a few of the more complex features and functionality that are still in development.

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Contenders

- › **Digital River excels at strategy but designed functionality for brands.** Because of Digital River's focus on brands rather than retailers, its most developed capabilities are those that brands care more about, such as special orders, replenishment, ship-to-store, and product-based rules. But capabilities that retailers are looking for are either underdeveloped or, in some cases, nonexistent. Digital River has minimal support for many store fulfillment capabilities, such as BOPIS, order pick/pack tools, and ship-from-store functionality. The solution is also not designed to be highly customized; Digital River has designed the solution for the direct-to-consumer space.

Digital River is a specialist for brands. Customer references highlighted a strong focus on serving brands without much need for in-store support. They cited Digital River's vision and knowledge of the direct-to-consumer industry numerous times as well as its willingness to do ongoing training and consulting on omnichannel strategy as part of the offering. Digital River tends to lean in on serving current needs of its client base rather than innovating to help brands rethink and redesign how they could engage consumers. The company needs to develop its partner ecosystem to a greater degree and add a few marquee global names to the list, which will allow it to focus more on developing — instead of installing — the product.

Digital River is a solution tailor-made for brands that are looking to sell directly to consumers and are hoping to apply omnichannel capabilities to their customer engagement strategy but that don't have the appetite for large investments in resources or the time to get up and running.

- › **Radial offers value-added business models but needs to focus on OMS strategy.** Radial is strong in a number of OMS criteria, including order orchestration, inventory segmentation, and store fulfillment. It offers the advanced reporting and analytics that all other vendors in this evaluation lack. Radial offers unique services for supporting omnichannel retailing including operating as a retailer's warehousing, distribution, and call center. It even owns payment processing and the fraud risk for a retailer. In this way, Radial acts equally as an OMS provider and partially outsourced service for omnichannel operations. Although Radial is well rounded and has some unique capabilities such as tools for in-store associates executing same-day delivery, it is not advanced in most features. Radial also needs to make improvements in the areas of workflows and notifications.

Radial's OMS solution was built on top of a license deal with IBM a number of years back, but it has since taken steps to shift off parts and pieces of the solution to a self-developed platform. This has taken some time, which might account for some customer references stating that they were happy with Radial's current capabilities, but that development work has been behind their expectations and they would like to see more innovation from the company; they were not able to articulate the company's road map. While Radial does have some specialized services associated with omnichannel, it is not part of a suite; clients will need to look elsewhere if they wish to upgrade other parts of their commerce platforms such as a webstore, PIM, or POS.

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Radial best fits retailers that need strong features across numerous areas of omnichannel, can utilize the special services the company has to offer, and don't need a lot of hand-holding to become an omnichannel organization.

- › **Jagged Peak provides speed to market but continues to cater to brands.** Jagged Peak's features and functionality target brands and small to midsize business (SMB) retailers that generally look for simpler solutions than those utilized by complex, enterprise-level retailers. As with other OMS vendors that primarily serve brands, special orders and replenishment are strong, and the specific criteria for enterprise order management check all the necessary boxes. The solution lacks full support for those with physical locations and is less developed in areas such as store-based orchestration rules, endless aisle support, and workflow/notification management. Jagged Peak also does all its own integrations, so its service integrator partnerships are nonexistent.

Jagged Peak's unique, go-to-market strategy focuses primarily on brands including luxury, health and beauty, and consumer packaged goods (CPG). This makes it a rather specialized vendor compared to some other vendors in this evaluation. It is, however, working its way into the SMB retail market with a new but limited commerce suite offering. Because the company works on all implementations directly with clients, a highlight in its strategy is the training and consultation services it offers, which customer references said were very strong. Its product vision for the market it serves would best be described as on target, but customer references did not feel the company was particularly innovative.

Jagged Peak's solution works well for brands and some SMB retailers looking for both B2B and B2C support, those who want omnichannel capabilities without dedicating a lot of resources to the initiative, and those requiring considerations for regulations and security requirements.

Challengers

- › **Kibo integrates Shopatron into a suite but is a better fit for SMB.** Kibo's offering is a result of a number of commerce-based companies — including Shopatron — merging together in late 2015. Serving SMB and midmarket retailers, the solution provides respectable contact center and order channel capabilities, with core support for distributed order management, order orchestration, and store fulfillment. The features and functionality will support an SMB retailer that needs an omnichannel program. Kibo needs improvements in some operational and administrative areas of omnichannel, such as exchanges, international ordering, and the ability for business users to perform post-implementation customization.

Kibo's OMS strategy has changed from its days as Shopatron and the company has experienced changes in corporate leadership over the past two years. The company has focused on a mix of OMS development and integration of solutions into a suite. As a result, customer references felt Kibo had not communicated its plans for omnichannel well to them. Customer references also stated that they were generally satisfied with the solution but feel Kibo needs to focus more on improving the OMS itself, including administrative tools and order management.

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Kibo is a good solution for brands, SMB, and some midmarket retailers that need to get up and running quickly on a natively cloud-based OMS but don't have overly complex store fulfillment needs or require deep control in areas like enterprise inventory management.

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Supplemental Material

Online Resource

The online version of Figure 2 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings. Click the link at the beginning of this report on Forrester.com to download the tool.

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Data Sources Used In This Forrester Wave

Forrester used a combination of four data sources to assess the strengths and weaknesses of each solution. We evaluated the vendors participating in this Forrester Wave, in part, using materials that they provided to us by May 2018.

- › **Hands-on lab evaluations.** Vendors spent one day with a team of analysts who performed a hands-on evaluation of the product using a scenario-based testing methodology. We evaluated each product using the same scenario(s), creating a level playing field by evaluating every product on the same criteria.
- › **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.
- › **Product demos.** We asked vendors to conduct demonstrations of their products' functionality. We used findings from these product demos to validate details of each vendor's product capabilities.
- › **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls with three of each vendor's current customers.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria for evaluation in this market. From that initial pool of vendors, we narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation. Vendors marked as incomplete participants met our defined inclusion criteria but declined to participate or contributed only partially to the evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave evaluation — and then score the vendors based on a clearly defined scale. We intend these default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve. For more information on the methodology that every Forrester Wave follows, please visit [The Forrester Wave™ Methodology Guide](#) on our website.

The Forrester Wave™: Omnichannel Order Management Systems, Q3 2018

The 10 Providers That Matter Most And How They Stack Up

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with the [Integrity Policy](#) posted on our website.

Survey Methodology

The Forrester Analytics Consumer Technographics® North American Retail And Travel Benchmark Recontact Survey 1, Q3 2017 (US), was fielded in July 2017. This online survey included 4,509 respondents in the US between the ages of 18 and 88. For results based on a randomly chosen sample of this size, there is 95% confidence that the results have a statistical precision of plus or minus 1.5% of what they would be if the entire population of US online adults (defined as those online weekly or more often) had been surveyed.

The data was weighted by age, gender, income, broadband adoption, and region to demographically represent the US online adult population. The survey sample size, when weighted, was 4,509. (Note: Weighted sample sizes can be different from the actual number of respondents to account for individuals generally underrepresented in online panels.) Please note that the programming language herein reflects the survey respondent base for each question. Bases for specific questions have been changed in published data for increased clarity. Therefore, the base in published data may not match the base language in this document. Ipsos Observer fielded this survey on behalf of Forrester. Survey respondent incentives included points redeemable for gift certificates.

Endnotes

- ¹ When we asked US online adults which delivery options they have used in the past three months when shopping online, 26% indicated that they used “buy online, pick up in store,” 19% said they used “buy online, ship to store,” and 17% said they used “reserve online, pay and pick up in store.” Our survey accepted multiple responses to this question. Source: Forrester Analytics Consumer Technographics North American Retail And Travel Benchmark Recontact Survey 1, Q3 2017 (US).
- ² Source: Forrester Analytics Consumer Technographics North American Retail And Travel Benchmark Recontact Survey 1, Q3 2017 (US).
- ³ See the Forrester report “[The State Of Retailing Online 2018: Store Investments, Business Objectives, And Mobile.](#)” Source: “The State of Retailing Online 2018,” a Shop.org study conducted by Forrester Research.
- ⁴ Some vendors do not focus on selling OMS as a standalone solution and often include it as part of an eCommerce offering or suite. For a closer evaluation of those vendors, see the Forrester report “[The Forrester Wave™: B2C Commerce Suites, Q3 2018](#)” and see the Forrester report “[The Forrester Wave™: B2B Commerce Suites, Q3 2018.](#)”

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